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## 1 Administrator Set Up

If you are not the Administrator for your MessagePro account please skip to Chapter 2 of the user guide for the User Introduction.

Congratulations on signing up for MessagPro! Below we will walk you through the process of setting up your account as the administrator. As the administrator you will set-up and manage the numbers, users, and messages on your MessagePro account.

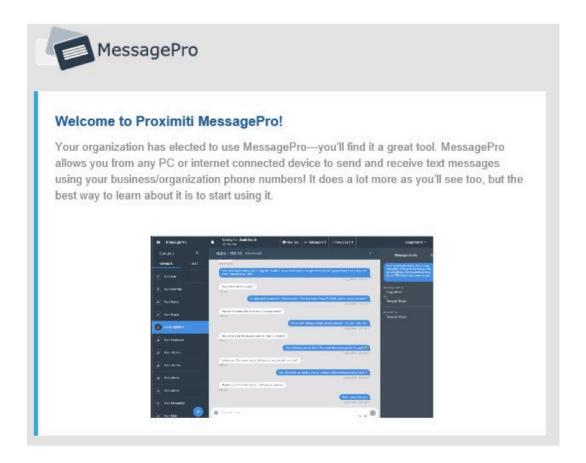
The following is the process you should follow for set-up.

### 1.1 Welcome E-mail

You should have received an E-mail from customerservice@messagepro.io after you signed up for the MessagePro service. In this email you will receive your login information including the username and password for your MessagePro account.

Below is what you should receive in the email.

#### Welcome message:



**Login information**: This is where your login information will be given to you.

### Logging In to MessagePro

MessagePro can be accessed from any Chrome or Firefox web browser and you don't need to download any software or apps to use. You can log in on the MessagePro web site www.messagepro.com or go directly via www.messagepro.com/app

Provided below are your Username(s) and Password, one for each Location/Name you can log into. The Username controls which messages you see intially and what number is used for outgoing messages. Once logged in, you can easily change to another Location / Name using the top bar in MessagePro.

Location / Name Your Username Password

Main Location John.Smith@18135791000 3ujfSoEi

MessagePro generates a random password for you. To change your password simply go to Menu and click on Settings. Scroll to the bottom and the Change Password option is in the lower right.

**Account Summary**: This will give the information about your particular MessagePro account.

### **Account Summary**

Here is the information your administrator provided for your account:

Account Name: Proximiti Communications 2.0

Account Number: 2147503

Account Administrator:

After receiving your email, it is time to log in to MessagePro

### 1.2 First step is to login to your MessagePro account.

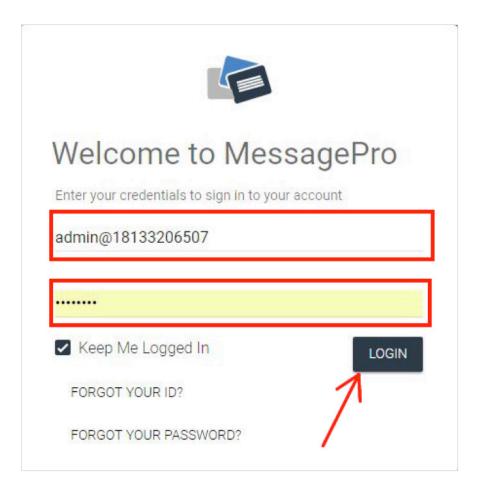
Logging into MessagePro:

On your Chrome or Firefox browser go to the URL www.messagepro.com

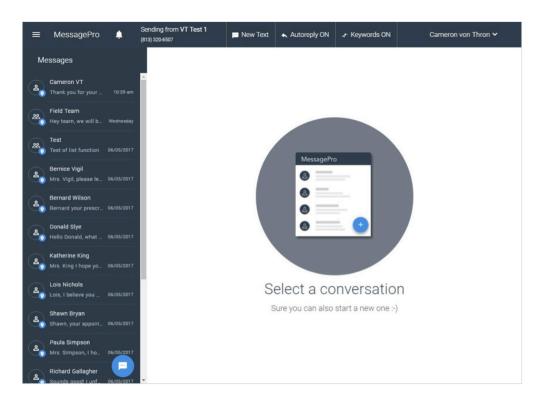
Click on the **Log In** button on the top menu options



Enter your **Username** and **Password** then select Login

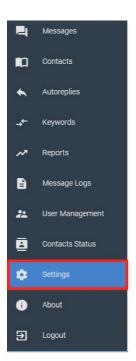


The following screen should appear:

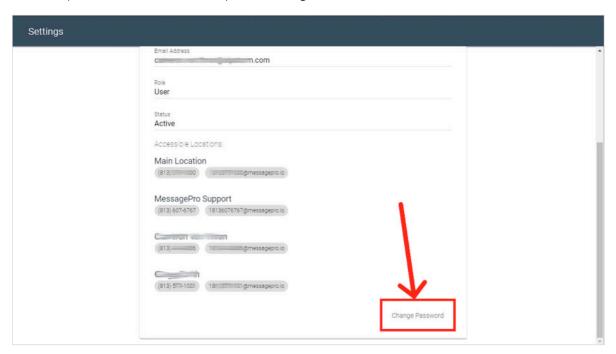


Next you may want to change your password.

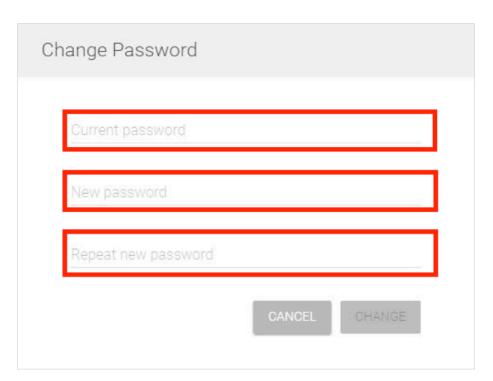
To do so, simply click on the **Menu** in the upper left corner of the screen and select the **Settings** option.



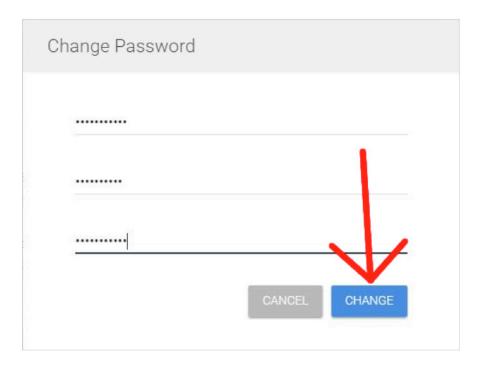
Scroll to the very bottom of the **Settings** screen. On the bottom right of your screen, below all of your 'Accesible Numbers' you should see the clickable option of **Change Password**.



Select **Change Password** and fill out the appropriate fields.



Once you all the fields are filled out select change and your new password has been set!

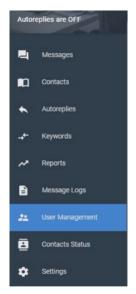


Be sure to follow this same process anytime you wish to change your MessagePro password.

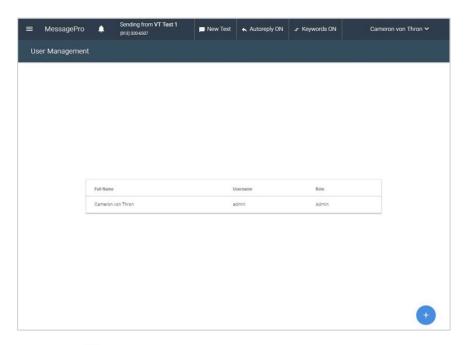
### 1.3 Setting up new users

The next step as an administrator is to set up the other users of your MessagePro system.

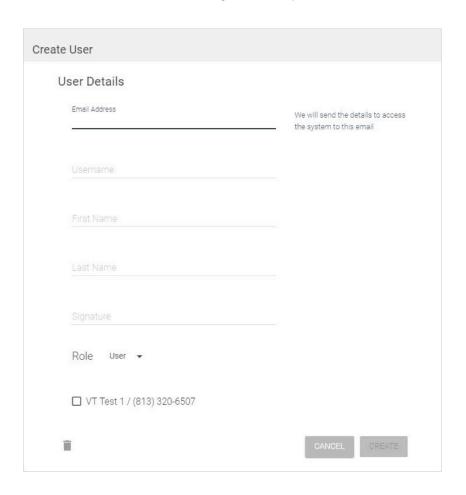
First you need to select the **User Management** option from the **Menu** 



From here a screen with all active users will appear.

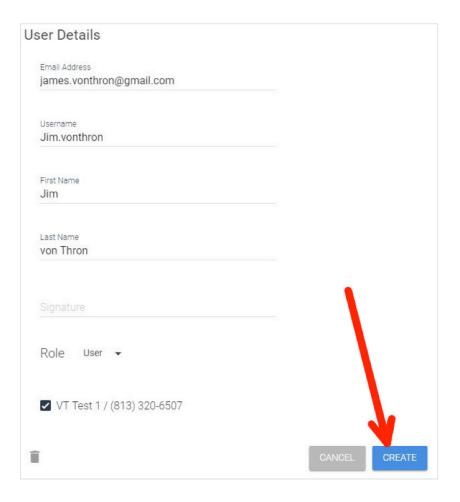


Select the icon in the bottom right corner of your screen and a new user box will appear.



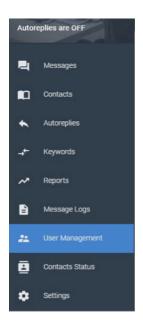
Fill out the appropriate information for the new user. You will need to provide the new user's email, username, first/last name and the role (user or admin) their MessagePro account will be operating as. You must then assign the new user to the The signature is optional for each user. \*Note: the new user will be emailed their MessagePro credentials to the email account that is provided.

Hit the **Create** button and the new user has been created in your MessagePro account.

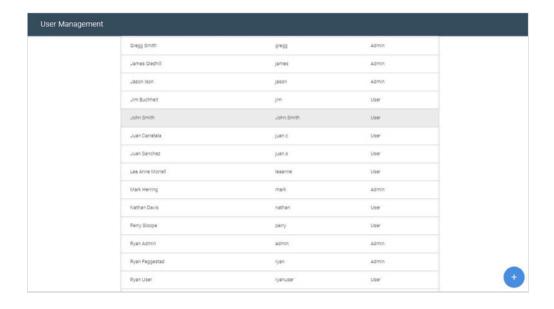


### 1.4 Deleting Users

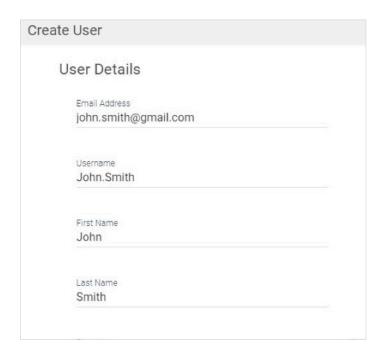
To delete users from MessagePro simply select  ${\bf User\ Management}$  from the  ${\bf Menu}$ 



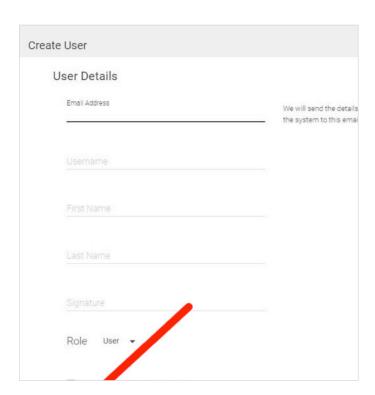
From here you will see a list of your active users. Select the user you wish to delete by simply clicking on their name



The following screen will appear.



Select the delete icon in the bottom left corner of the screen below all of the listed Locations/Number access numbers that the user is assigned to.



Confirm you wish to delete and the user is now deleted from MessagePro.

### 2 User Introduction

MessagePro is a messaging service that allows you to send a text message to numbers that are text enabled. MessagPro also allows you to text enable your phone number that may not otherwise be able to communicate in this way. It allows you to manage your contacts, message team members, and message customers all from any device that has an internet browser.

## **3 Getting Started**

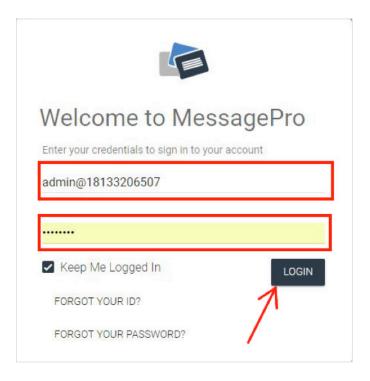
What is required to get started:

- Chrome and Firefox are the only supported internet browsers for MessagPro.
- Must have your MessagePro username and password available
- Compatible with iOS, Android, PC, Mac

Logging into MessagePro:

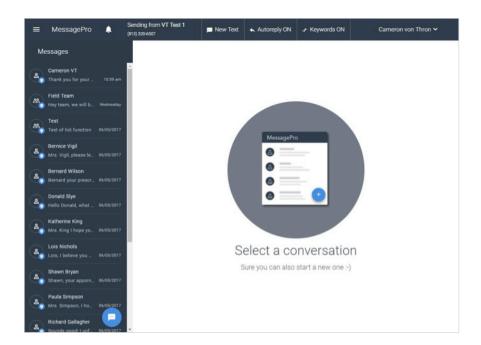
On your Chrome or Firefox browser go to the URL www.messagepro.io

Enter your Username and Password then select Login



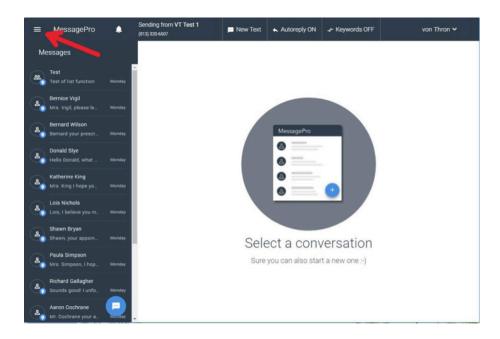
# 4 Getting Familiar With MessagePro

The following screen is what the home screen will look like when you login to your MessagePro account.

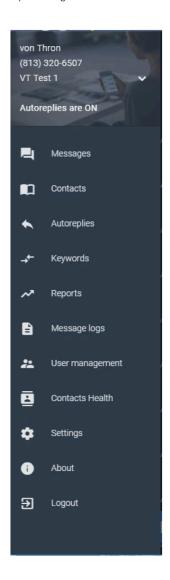


Now to familiarize you with some of the options we will explain some of the lcons and Options you see.

The **Menu** icon is located in the top left of your screen.



By clicking on the **Menu** the following options will appear



This **Menu** will allow you to manage all aspects of your MessagePro account.

From this **Menu** you can update settings and manage permissions for Contacts and Lists.

You can Add/Delete/Edit contacts.

Manage and edit your contact **Lists** 

Create and review standard **Reports** that help you track your message use both inbound and outbound.

Create **Autoreplies** to incoming messages that come in during certain times of day.

Create **Autoreplies** to particular **Keywords** that are texted to your MessagePro number.

There are some quick click options that will help you utilize your MessagePro efficiently.

The icon at the top of your screen allows you to quickly manage Alerts

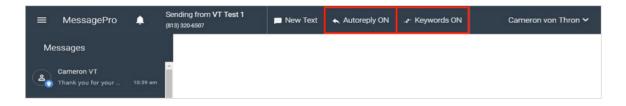


This will allow you to quickly see any unread messages you may have.

To quickly create a new text, simply hit the **New Text** button and immediately be creating a new text message.



**Autoreplies** are very useful for automatically responding to incoming text messages. A fast way to manage the **Autoreplies** and **Keywords** are to click the options on the home screen.



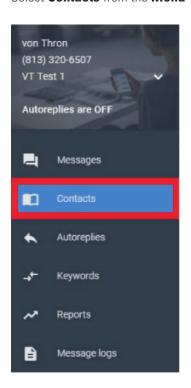
## 5 Importing Contacts

Now that you have MessagePro, you're going to want to send messages to your contacts as soon as you can. Here we are going to show you how to import your contacts.

First, select the **Menu** option at the top left of MessagePro



#### Select Contacts from the Menu

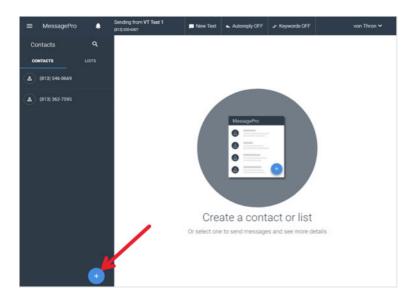


Now you are going to want to add your .csv contact list into your MessagePro.

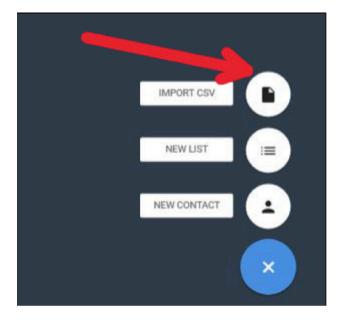
Outlook .csv Contact Export

**Gmail** .csv Contact Export

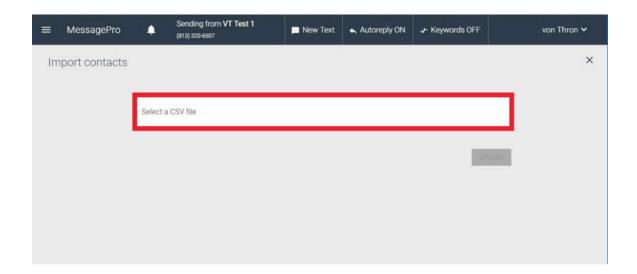
Select the icon, located on the bottom left of the Contacts Menu



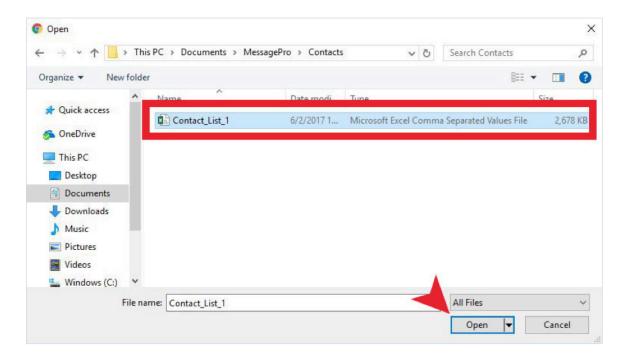
### Select **Import CSV** from the 3 options



Click on "Select a CSV file" Note: this file must be available on the device to be uploaded.



Double click on the file to upload or select the file and click **Open** 



### Click Upload

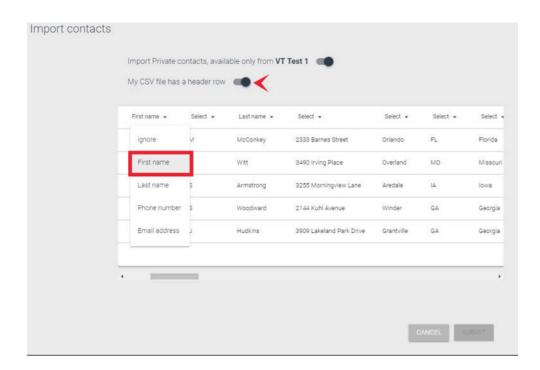


Once the CSV file is loaded you will have to select the pertinent data.

To do this you will have to select the columns of data you would like to import. Your imported CSV file may have more data elements than MessagePro needs and you may have multiple phone numbers for example in each data record and MessagePro only needs the mobile phone number and primary e-mail address of the contacts you are importing.

Choose which label to give each column. \*Note: Ensure if your file has a header row or not. Activate the header row option accordingly. \*

Select the 4 pieces of data for data import. First Name, Last Name, Phone Number, Email



Finalize your selections and click **Submit**. Your contacts are uploaded in the MessagePro system!

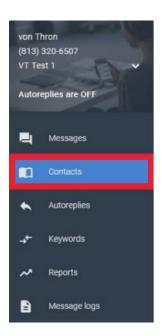
## **6 Create New Contact**

You can also manually add new contacts into MessagePro. Here's how to do so.

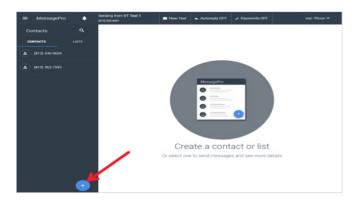
Click on the Menu (Located in the top left corner)



Select Contacts from Menu options:



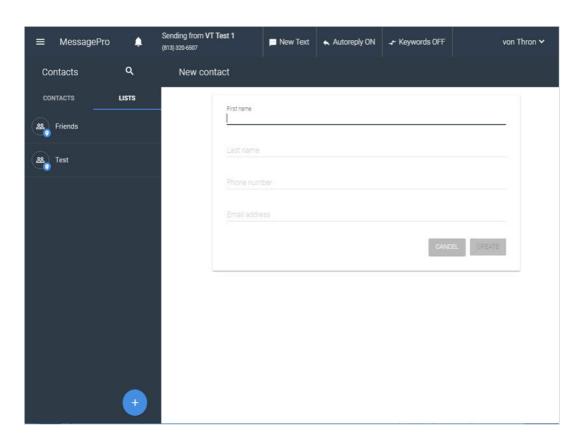
Select the icon, located on the bottom left of the Contacts Menu



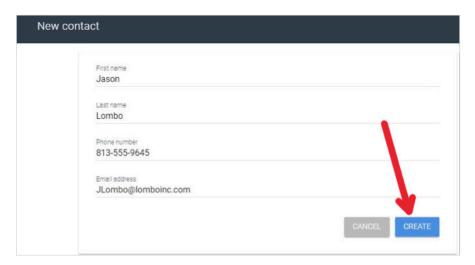
### From the 3 options provided select **New Contact**



The following screen will show:



Insert the new contact's **First Name, Last Name, Phone Number** and **Email Address** then select create.

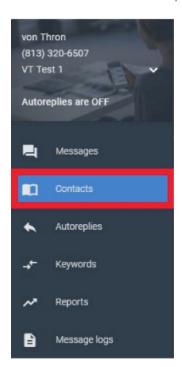


\*Note: The phone number that is input will automatically be checked and verified as a text enabled number\*

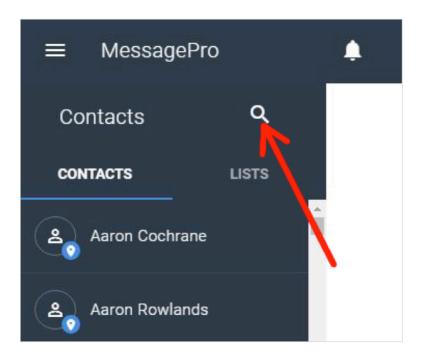
The new contact is now available in your contact list. The name will now be searchable through your contact menu.

# 7 Editing/Deleting Contacts

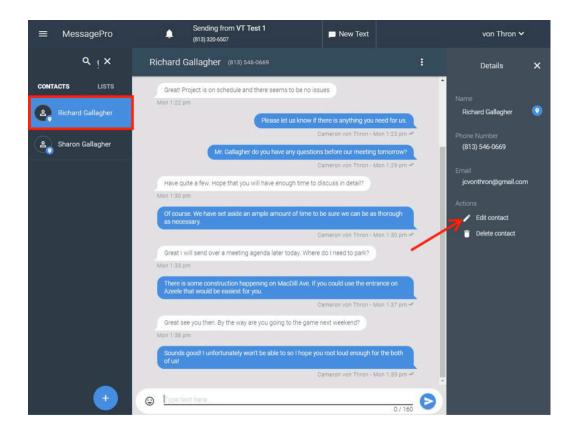
Select Contacts from Menu options:



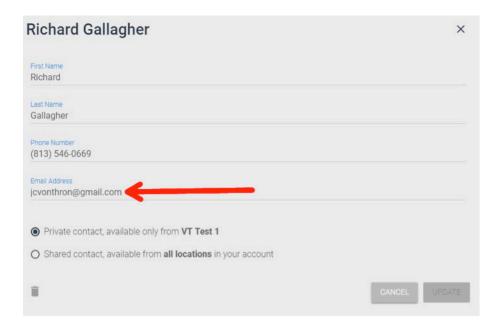
Click on the **Search** icon and type in the name of the contact you want to edit/delete.



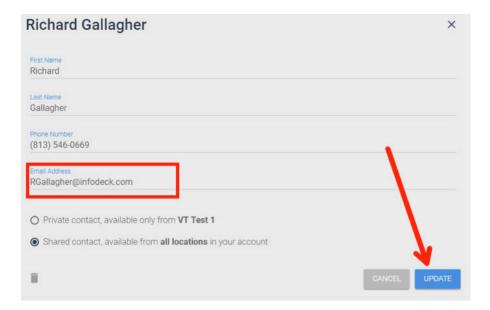
#### Select the Contact Name and click on the Edit Contact or Delete Contact



If you select **Edit Contact** click on the field that you wish to update.



Enter the information you wish to update and click on **Update** to save the changes made.

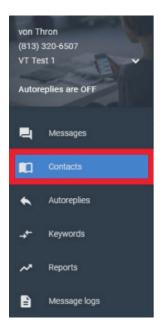


The contact information has now been updated and saved.

## **8 List Creation**

Lists will be groups of contacts that you can contact simultaneously. For example, if a team needs to communicate, a list can be created and your message will be pushed to all members of the list. This type of blast messaging is a great way to quickly communicate with multiple people.

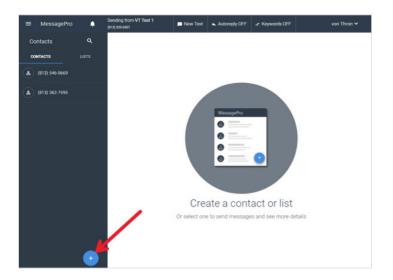
Click on the Menu and select Contacts.



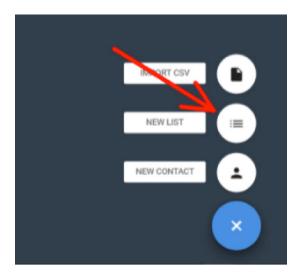
There are two ways to create lists from this point. We will show you how to do both here.

### **List Creation #1:**

Select the icon, located on the bottom left of the Contacts Menu



### From the 3 options provided select **New List**

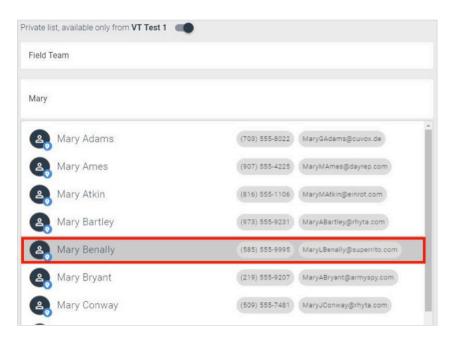


You can create a public or private list. A private list will only be available for use by the administrator that creates it.

After you give your new list a **Name**, find **Contacts** to add by searching through your contact list. Click on the "Find contacts to add" and begin searching for names in your contact list.

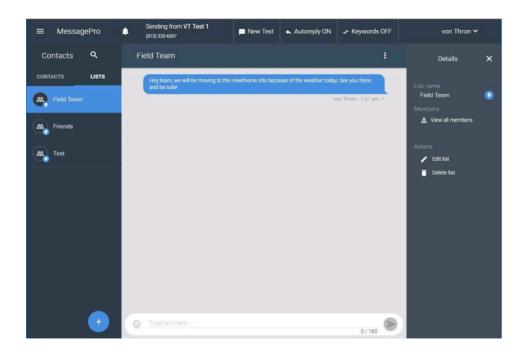


Type in the name of the contacts that you want to include in your list. As you type a list of matching contacts will drop. Select the contact you want to add to your list.



Once you have added all the contacts you need, click **Save** and your list has been created.

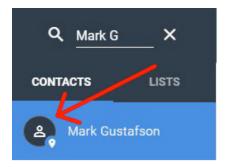
To message the members of your list simultaneously simply select the list and type your message. Each member on the list will get it.



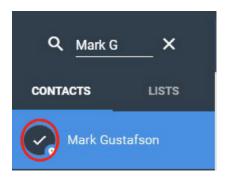
### **List Creation version #2:**

Another way to create a list is to simply select the icon next to each contact name directly from the contact list. Continue to select the icon next to all contacts you wish to include and a list will be created by simply clicking on the create list icon with all the contacts you selected. We will give you an example of how to accomplish this here.

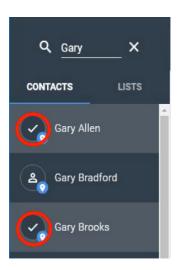
Find the first contact that you would like to include in your **List** and click on the contact's icon.

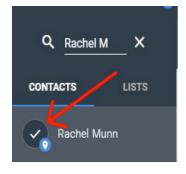


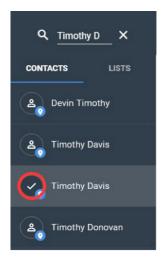
Once you click on the icon next to the contact a check mark should appear signaling that the contact has been selected.



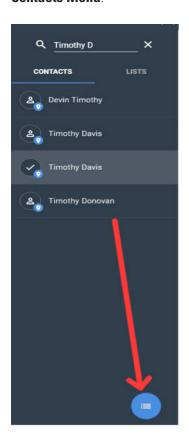
Continue this process for all of the contacts that you want to include in your particular List. You can select one contact and then search for another. MessagePro will keep track of which contacts were selected.



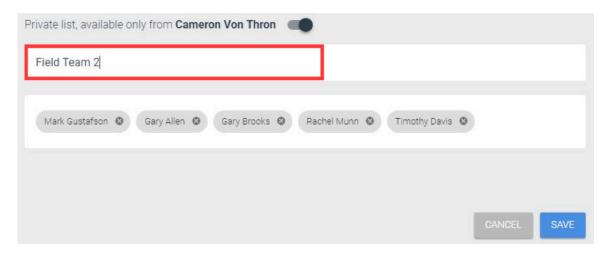




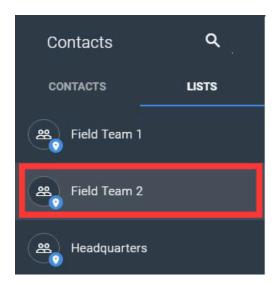
Once you have all of the necessary contacts selected, click on the 'Create List' icon on the bottom right of the **Contacts Menu**.



The next screen will show all the names you selected (note the selected names above) and ask you to give this new **List** a name.



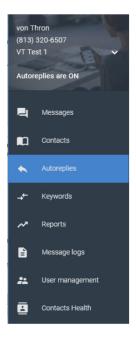
Once a name has been entered, simply hit the save button and your **List** has now been created. You may select the list from the **List** option on the **Contacts Menu**. From here simply select the list you want and you can message all the included contacts at once.



## 9 Autoreplies

The autoreply function allows you to respond immediately to incoming messages with pre-drafted responses. Autoreplies can be activated/deactivated at any time. Each autoreply you create has a time window that determines when it will be in operation while it is activated.

Click on the **Menu** and select **Autoreplies** 



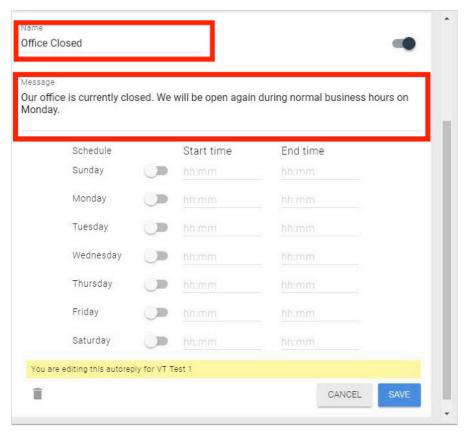
Once on the Automations page select the add icon



located on the bottom left corner.

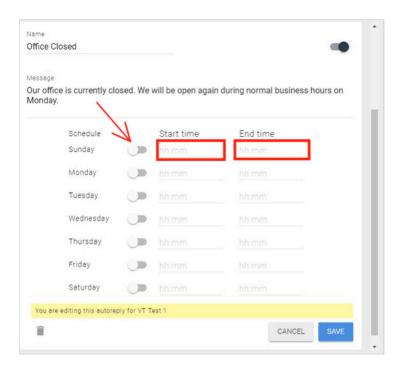
After clicking on the **Add** button you will need to give your autoreply a name, the message you want to automatically respond with, and set the times for when you want the automated response to be active.

First you want to give your autoreply a name and message. Select the **Name** and **Message** boxes and type in the content you want.



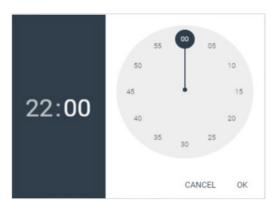
After you have the Name and Message saying what you want, it is time to set the times you would like the autoreply to be active. To do this simply activate the days and time frames for those days you want the autoreply to be on.

To set a day and time simply click on the switch located next to each day then click on the start/end time to set the active timeframe.



To set the start/end time first select the **Start Time** for the day you wish to activate. A window will pop up to first set the **Hour** then set the **Minute**.



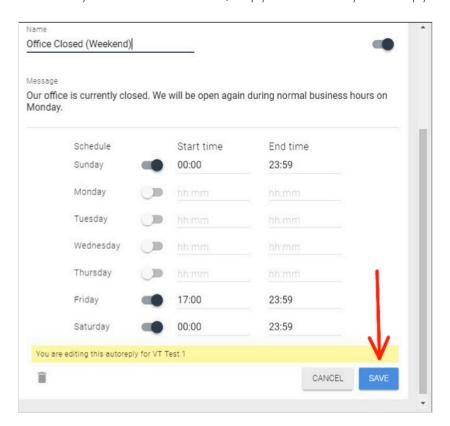


Hour Minute

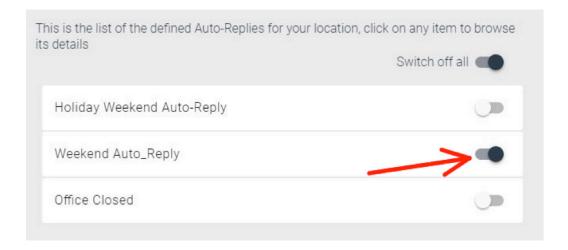
Once you have the **Start Time** follow the same steps above for the **End Time**.

<sup>\*</sup>Note: In order to have an autoreply message encompass an entire day simply set the **Start Time** as 00:00 and the **End Time** as 23:59\*

After the days and times have been set, simply click **Save** and your autoreply is complete!



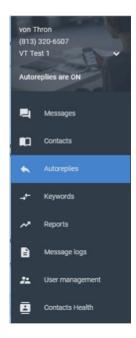
You can manage and edit all your **Autoreplies** at any time. To activate a specific autoreply, click the switch next to the autoreply you wish to turn on.



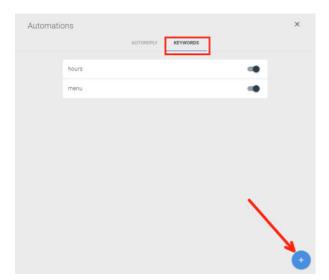
## 10 Keywords

Keywords will provide a dedicated response to anyone that messages your number with a single word. For example, if a customer messages "hours" to your MessagePro enabled number, they can receive an automatic response detailing your business' hours of operation.

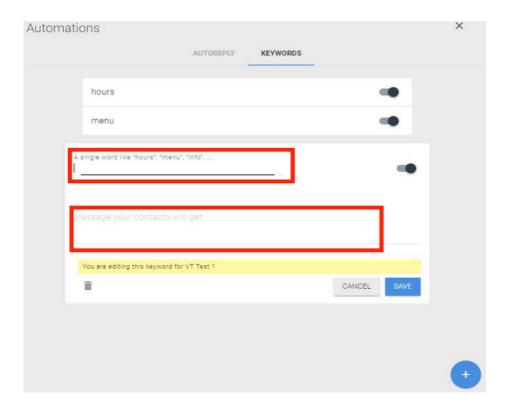
Click on the Menu and select Autoreplies



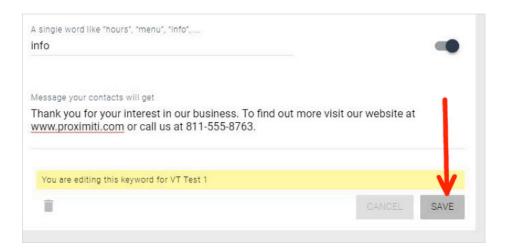
Next select the **Keywords** option and select the add icon located on the bottom left corner of the automations



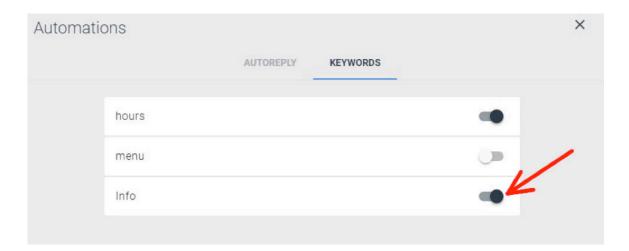
Enter the single **keyword** you wish to include and the **message** that your customers will see when that word is texted to your number.



Select the **Save** button to activate your new keyword.



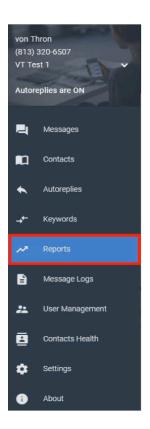
You can manage your active Keywords by simply clicking on the switch next to your created keywords. This will activate or deactivate the automated message response for each single keyword.



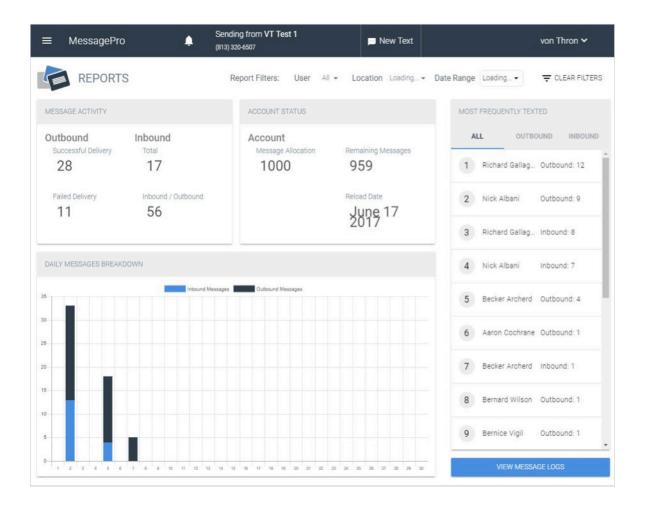
# 11 Reports (Admin Only)

MessagePro allows you to use detailed reports about your message use and response rates. Easily track your message use and how many messages you have remaining.

To check on your account's reports select the **Reports** option from the menu.



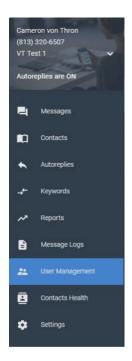
The **Reports** page includes multiple metrics that can be useful to track message use.



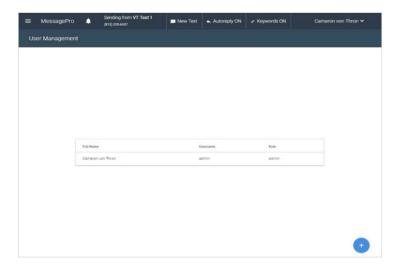
## 12 User Management (Admin Only)

As an administrator you have the ability to manage the various users for a particular number. This means you can add individual accounts to be able to message with a particular number and manage these accounts. We will show you here how to Add and manage an account to MessagePro.

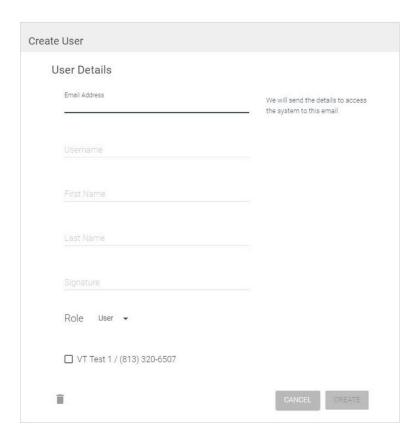
First select **User Management** from the **Menu** options



The following page that appears is the User Management administration page.



To add an additional user to your account select the icon on the bottom right of the page, then input the contact information necessary.

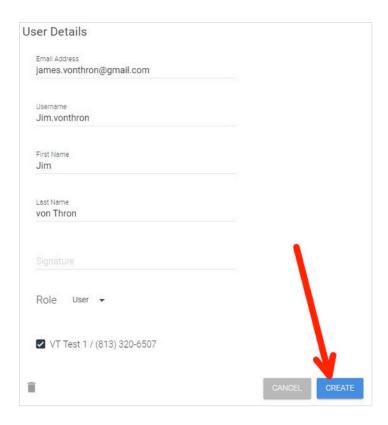


The next step is to choose the type of **Role** this new user will have. The two options available are 'User' and 'Admin.'

Creating a new 'User' will allow for use of the message service. Creation of an 'Admin' will allow this user to have full administration access to the MessagePro account.



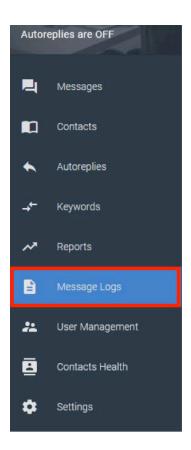
Once you input all of the contact information and select the **Role** the new user will have, simply select **Create** and the new User is added into the system.



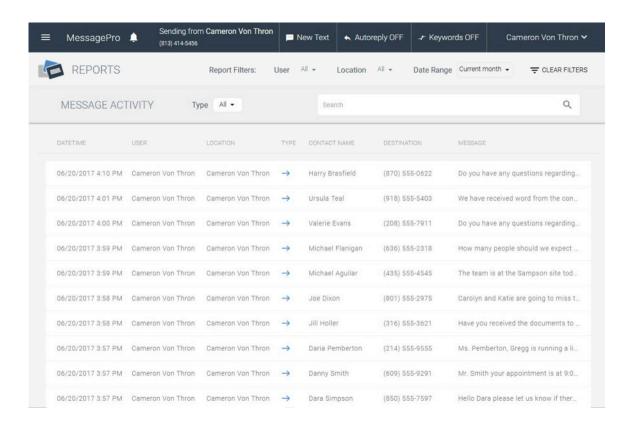
## 13 Message Search (Admin Only)

As a MessagePro Administrator you are connected to all the messages that are sent and received to you and the Users under your management. MessagePro has a convenient and powerful search tool that will allow you to search through all the messages sent and received by all the numbers under your administration.

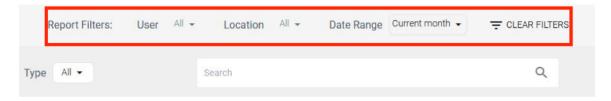
To use the search function, first you must select **Message Logs** from the **Menu** options.



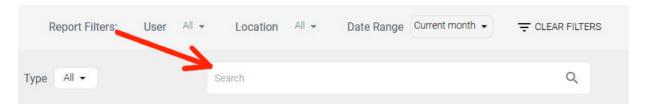
After you click on **Message Logs** the following page will appear.



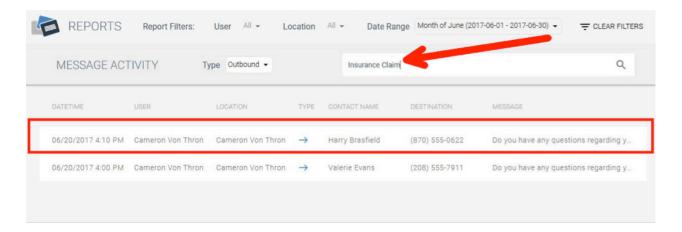
From here you can search the entirety of your inbound/outbound messages. There are filters that you can apply to narrow your search results down.



The filters can include searching individual **Users**, **Locations** (MessagePro enabled numbers), **Date Range**, and **Type** (Inbound/Outbound). Once you apply your necessary filters you can search for any words or phrases you may be looking for in the search bar.



The search feature will scan all the messages sent and received by your MessagePro account numbers, applying any filters you may have utilized, and return to you all of the messages containing the word or phrase you are looking for.



From here you can see the date and time the message was sent. Who sent the message and to whom the message was sent. This is a great way to keep track of messages and a good archive to have in case there is a need to look at past correspondence.

If you encounter issues not addressed by this user guide, please contact your account manager for additional support.

### **Contact Us**

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